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STAT

CENTRAL INTELLIGENCE AGENC INFORMATION FROM

FOREIGN DOCUMENTS OR RADIO BROADCASTS

COUNTRY

DATE OF

INFORMATION 1949

SUBJECT

Economic - Industrial

HOW **PUBLISHED** Monthly periodical

DATE DIST. 2

WHERE

PUBLISHED Wareaw NO. OF PAGES 13

DATE

PUBLISHED

Jul 1949

SUPPLEMENT TO

LANGUAGE

Polish

Poland

REPORT NO.

THIS IS UNEVALUATED INFORMATION

SOURCE

Wiadomosci Marodowego Banku Folskiego (News Bulletin of the Mational Bank of Poland).

ECONOMIC SITUATION IN POLAND IN MAY 1949

Coal Industry

X NAVY AIR

STATE ARMY

In May 1949, the plan for the extraction of black coal was achieved 100 percent with a total of 6,183,000 tons extracted in 25 workdays. In April, with the same number of workdays, 5,934,000 tons were extracted.

Production of the More Important Products in the Coal Industry

(In 1,000 tons)

	, ,	•	% of Plan
Item	Apr 49	May 49	May 49
Black coal Brown coal Briquettes (black coal) Ceiro	5,934 556 51 433	6,183 374 56 304	100 110 113 106

In May, the average productivity per man-day increased to 1,293 kilograms ac compared to 1,273 kilograms in the previous month.

The highest productivity was achieved by the following Associations: Katowice, 1,384 kilograms per day; Ruda, 1,368 kilograms per day; Chorzow, 1,343 kilograms per day; Bytom, 1,331 kilograms per day; and Rybnik, 1,310 kilograms per day.

Goal loadings at the mines reached \$,016,000 tons, achieving the plan 102.5 percent.

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Extraction of Black Coal According to Associations

(In 1,000 tons)

Assn	Apr 49	May 49	% of Plan
Rybnik	591	6 2 5	107.3
Dabrova	7 1 9	745	103.0
Jaworsyna-Mikolow	585	600	101.7
Gliwice	675	703	201.5
Ruda	739	775	101.3
Bytom	584	610	101.1
Katowice	618	638	97.4
Zabrie	568	576	96.9
Dolny Slask	271	296	94.2
Chorzox	584	615	93.0
Total	5,934	6,183	100.00

The Hybnik Association is in first place in coal extraction for the third successive time.

In the last 10 months, prizes amounting to 3 million zlotys were given for 226 of the 344 innovations submitted. It is expected that the exploitation of the innovations will result in a saving of 200 million zlotys.

Fower Industry

The power industry achieved the May plan 105 percent; the hydroelectric plants achieved the plan 138 percent.

Electric Power Production

(In kw-h)

1949	Plan	Actual	5 of Plan
April total	371,930	372,02 1	100
thermoelectric plants	328,726	304,729	93
hydroelectric plants	43,204	67,292	156
May total	358,714	377,385	105
thermoelectric plants	322,692	327, 53 4	101
bydroelectric plants	36.022	49,8 5 0	138

Analysis of the above table discloses that the production plan for May was smaller than that for April. This was justified since the days in May were longer than in April and consumption declined. Actually, production in May was somewhat greater than it was in April. With the successful industrial development in the country, demand for power intreased, despite the summer months.

Metallurgical Industry

This industry achieved the May production plan in the more important products, as follows:

p oi Plan		
Apr 49	May 49	
111	109	
109	105	
105	108	
101	103	
111	112	
	Apr 49 111 109 105 101	

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The production plan was exceeded by the individual groups, especially in the production of seamed pipes.

As of 1 May 1949, 145,567 persons were employed by the entire industry, in luding nonferrous metals, an increase of 1,473 over the previous nonth.

Production of the Associated Enterprises of Monferrous Metals for May is as follows:

	20 OI LIGHT MONTALAGO		
Product	Apr. 49	May 49	
Zinc Sulfuric acid Sulfur	109 113 105 107	108 102 145 107	

The best results were achieved by the rolling mills and refineries.

Improvement in the quality of production designated for export was also noted.

Petroleum Industry

The petroleum industry achieved the May plan 106 percent in the extraction of petroleum, 110 percent in the production of crude gasoline, and 111 percent in the production of solid lubricants.

In cooperation with the workers, the industry worked out the 1949 savings plan, which will emount to 980 million zlotys.

Motal Industry

This industry achieved the plan in almost all branches of production, as follows:

Production of the More Important Products of the Coatral Board of the Metals Industry Enterprises

(Retimated	3-4-1
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	Apr 49	May 49	May 49
Units			133
			112 124
-			106
Tons			92
Tint+a	•		105
onice			120
	Tons Units	Units # 471 # 41,902 Tons 636 # 369 Units 43	Units 471 340 471 340 471 340 47,902 32,726 Tons 636 707 369 384 Units 43 45

The achievement of the industry in the production of railway rolling stock should be emphasized. A steady increase in production is especially important since transportation is vital in the economic life of the country and it is necessary to replace much of the old and damaged steck. The volume of production enables Poland to increase the expert of railway rolling stock. Poland's chief importers are the USSR, Bulgaria, and recently Albania and Holland. Another favorable achievement is the increased production of boilers and equipment important in the development of the power industry in Poland.

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Value of Production for May 1949

(In 1,000 zlotys, 1937 prices)

Industry	Plan	Actual	s of Plan
Machine tools	5,548.3	5,305.4	96
Implements	4.581.5	5,333.6	116
Abrasives	872.1	1,188.8	136
Precisions and optical instruments	1.921.0	2,104,4	1.09
Farm and flour mill machinery	4,161.4	4,276.8	103
Railroad rolling stock and equipment	30,816.7	35,561.0	115
Artomotive	8,845.8	9,345.6	106
Machines	8,325.2	8,097.4	97
Castings	9,636.0	11,250.4	117
Sheet metal products	6,592.5	7,278.6	110
Wire products	10,974.5	42 ,031.0	110
Steel furniture	1,304.2	1,179.7	90
Boilers	9,424.1	11,258.1	119
Textiles	2,734.3	2,979.4	109
Miscellaneous	3,285.6	4,289.9	130
Total	109,023.0	121,480.1	111

Electrotechnical Industry

The electrotechnical industry achieved the plan in the more important items as follows:

Production of the More Important Items of the Electrotechnical Industry

(Estimated data)

Item		Apr 49	May 49	% of Plan May 49
Electric meters and clocks	Units	16,381	18,200	115
Batteries and cells	Tons	60	41	128
Electric light bulbs	1,000 units	2,249	2,313	110
Telephone instruments	Units	2,015	6,100	131
Radio receivers	Units	3,800	3,635	182

Shop competition and the improvement in the supply of raw materials were responsible for the above achievements. The industry achieved the production plan 11h percent, or a total production of 5,12h tons. The production of the individual branches for May is given below (in tons):

<u>k</u>	Apr 49	May 49	May 49
Machines	766	764	122
Pauliment	551	525	112
Cables and chemicals	3,555	3,620	112
Telephone and telegraph communications	147	215	124
Total	5,019	5,124	114

Chemical Industry

The May production plan was achieved 111.4 percent in value.

In physical quantities there was a marked increase not only in the production of those products which were always at a high level, but also in the production of those in which bottlenecks were found hitherto.

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Production of the More Important Items of the central Administration of the Chemical Industry

(In	tons)
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Item	Apr 49	May 49	% of Plan May 49
Hydrochloric acid (adjusted to			
100% acid)	575	585	104
Raw soda	17,879	17,216	104
Soda ash	10,864	10,510	112
Caustic sods	4,625	4,533	109
Carbide	11,258	12,210	98
Calcium cyanamide	12,770	12,743	98
Superphosphate	25,884	28,727	105
Orudo tar	2,324	2,475	120

Textile Industry.

In May, the value of production of the textile industry at 1937 prices was 198,980,000 zlotys, or 97.8 percent of the plan. The achievement of the individual branches is as follows (in percent): cotton 89.3, wool 100.1, bast fibers 108.8, fancy silk goods 103.2, knitwear 109.0, synthetics 99.8, textiles and other products for industrial use 100.5, flax and hemp retting plants 96.8.

Production of the more important items is given below:

Production of the Textile Industry

(Estimated data)

Type of Industry, Present	Apr 49	May 49	% of Plan May 49
Cotton: Fine spun yarn	Tons 338	341 802	100 101
Scrap yard Cotton fabrics	* 811 1,000 meters 32,219	27,739	90
Wool: Carded yard (Tcns 2,165	2,151 846	96 10 4
Wool fabrics	1,000 meters 3,833	3,918	101
Bast Fiber yerns:			
Linen fabric	1,000 meters 3,059	3 ,1 36	103
Jute fabric	1,000 meters 207	99	131
Synthetic yarns:		_	
Staple yarn	Tons 1,014	1,028	102
"Artex" Jarn	# 42	42	

Due to a shortage of jute on the international markets, the ranufacture of synthetic jute was started. It is no longer in the experimental stage; production of synthetic jute fabric for bags in progress.

In May, employment was increased by 2,574 and the number of employed reached 312,860, which included 284,872 wase workers and 27,988 salaried workers. The increase was chiefly in the cotton industry (1,023) and in the wool industry (836).

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Clotning Industry

The May production plan of the clothing industry was achieved 100.2 percent; the value of production at 1937 prices was 23,011,000 zlotys.

Individual branches achieved the plan as follows (in percent): state ready-to-wear industry 109.8, private ready-to-wear industry 58.9, button industry 117.2, hat menufacturing 105.4.

Production in the individual branches in terms of quantity was as follows:

Ready-to-Wear Industry Coats Underwear Bed linen	Units	69,109 656,628 329,902
Button Industry Buttons Tailors' findings	Gross	239,436 9,285
Hat Manufacturing Hats Felts	Units	41,137 7,486

Supply in general was efficiently handled. A marked improvement was noted in the supply of the button industry except for the shortage of cold rolled-steel strips. The Central Office of Supply for the Clothing Industry started to clear the surplus material which was not required by the production plan. In order to clear the existing surplus more efficiently, il committees of the Ministry of Pomestic Trade were established.

Leather Industry

The leather industry exceeded the May production plan by 13.6 percent; the value of production at prewar prices was 25,791,000 zlotys. Individual industries achieved the plan as follows (in percent): tanning industry 115, foctwear industry 113, leather products 99, fur industry 126, white leather and glove industry 125, auxiliary products 134.

Production of the More Important Products of the Leather Industry

	(Estimate	d data) .		% of Plan
		Apr 49	May 49	May 49
Tannery Production Total (figured in terms of raw hides)	Tons	3,980.7	3,836.4	119
Production of the more important varieties of leather			٠	
Sole leather Russia leather	Tons	1,081.4 75.6	1,0 4 2.9 67.8	117 133
Leather for induse trial use White leather Leather for uppers	" " 1,000 sq m	24.0 26.3 111.8	24.5 22.3 117.1	175 131 94

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4 of Plan May 49 Apr 49 May 49 **Footwear** 116.4 903.3 1,000 pr 839.4 Total Leather footwear 120.1 586.6 646.3 1,000 pr (included in total) 38.9 32.4 112.1 Industrial erticles 78.5 123.7 79.9 Tons Chemicals and tannins

The collection of raw hides in May reached 2,180 tons, or 114.1 percent of the plan. The collection of cattle hides decreased (82.9 percent of plan) while the collection of pigskins increased (909 tons or 148.5 percent of plan). The present supply of kidskins will be adequate for the white leather industry.

In May, the tanneries were supplied with 3,670 tons of hides (raw weight) including pigskins, but not fur pelts. In general, the plan of supply was achieved except for belting leather, leather for industrial use, and harness leather. There was no shortage of basic raw materials. Imports of cattle hides amounted to 780 tons plus 53,760 lambskins for jackets received from Yagoslavia.

In May, the Trwalosc Factory in Krakow was socialized, which increased the masher of active enterprises to 97. As of 31 May, there were 21,246 persons employed, including 18,946 wage earners and 2,300 salaried workers, an increase of 453 persons.

Wood Industry

This industry, subject to the CZPD (Central Administration of the Wood Industry), achieved the monthly production plan 126 percent; the value of production at 1937 prices was 14,100,000 zlotys, exceeding April production by 200,000 zlotys.

Value of Production of the CZPD According to Associations

(In 1,000 zlotys, 1937 prices)

Asen	o	Apr 49	May 49
Dolny Slask Frakow-Slask Bentwood Fürniture Western Central Pomorze Mazury Zamosc Bydgoszcz		2,111 1,661 1,044 2,014 1,301 3,582 1,481 232 483	2,099 1,655 1,010 2,239 1,361 3,515 1,524 228 475

Production of the More Important Items of the State Wood Industry in May 1949

Item		Production 5 c	of Monthly Plan
Sawaill Products Soft boards Hard boards Other sawed varieties	Cu m	21,319 plus 13,513 5,470 3,336	119

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Item		Production 5	of Monthly Plan
Boxes Thick walled Thin walled	Units	402,975 plus 13,1 5 8 389,817	184
Bentwood Furniture Chairs Armshairs Other bentwood items	Units	76,820 plus 62,558 1,745 12,517	111
Berrels For liquids For solids	Unita	30,684 19,089 11,595	103
Plywood boards and laminated wood panels	Cu m	2,610 plus	121

In May, production of all items except barrels exceeded that of April; the greatest increase was noted in the production of boxes.

At present, 96 plants employing from 150 to 1,000 workers are subject to the CZPD. These are among the largest wood products plants in Poland. The plants not subject to the CZPD are smaller, each employing up to 100 workers. Concentrated production resulting from the consolidation of plants subject to the CZPD enables the State Wood Industry to operate more efficiently and to raise the production potential.

Topar Industry

The paper industry achieved the production plan for May 123.6 percent; the value of production at 1937 prices was 34,109,000 zlotys.

Production of the Paper Industry

(In tons--estimated data)

Item	Apr 49	May 49	% of Plan May 49
Wood pulp	9,782	9,162	113
Cellulose	10,285	10,759	114
Paper	21,556	21,040	126
Cardboard	3,065	3,559	110

The plan of supply was efficiently handled and no difficulties were encountered. As of 31 May 1949, the number of workers employed was 30,834 including 27,304 wage earners and 3,530 salaried personnel

In May, a straw cellulose factory was activated in Malazyce which will operate in three shifts.

Building Materials Industry

The value of production in May in the building materials industry 30,900,000 zlotys at 1937 prices, which is the highest production so far this year, and greatly exceeds the monthly plan.

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Production of the More Important Items of the Building Materials Industry

Item			Apr 49	May 49	May 49
Quick lime Portland cement Window glass Bricks - solid Tar paper	and cellular	Tons 1,000 sq m 1,000 bricks 1,000 sq m	66,381 176,487 744 20,262 2,301	69,879 226,272 788 49,546 2,231	101 116 101 106 121

The production plan was exceeded by all branches, but an objectally great increase was noted in brick production.

In May, the number of active plants was 436, including those in the regained territories. The number of workers employed in the industry, as of 1 June 1949, was 73,610 workers, or 5,476 persons more than in April.

In May, 61,442 tons of cement were exported, which exceeds the larges monthly export so far by 14,442 tons.

To achieve the economic tasks of the Six-Year Plan, cement production must be increased adequately. Preparatory work has begun on a new plant, the Gigant, in Strzelce Opolskie. The actual building of the plant will begin next year. The cost of construction is extimated at about 3 billion zlotys.

Fermentation Industry

This industry achieved higher production in May than in April, exceeding the plan in all items as shown in the following table:

Production of the More Important Items of the Fermentation Ludustry

(Estimated data)

Plan 49
22 06
28 42 97
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At present, the CZFF (Central Administration of the Fermentation Industry) embraces 62 breweries, 13 local malt plants and 46 brevery malt plants, 20 plants producing wine and fruit juices, 16 vinegar and mustard plants, a lactic acid plant, a sulfurating plant for hops, and yeast plants acquired in April by transfer from the Central Administration of the Food Industry.

It is interesting to note that before the war Poland exported barley in its raw state and the refining process took place in the importing country at a great profit, while at pr sent, Poland is making barley malt and exporting the surplus production.

Meat Industry

This industry, separated from the canning industry after the liquidation of the Central Administration, exceeded the May production plan substantially. The production of the enterprises taken over by the Central Administration of the Meat Industry formerly subject to the Central Meat Office is not for the moment included in the production plans of the Central Administration of the Meat Industry and in May was considered as production outside the plan.

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Production of the More Important Items of the State Canning Industry

(In tons)

•	Ā	er 49	Ĉe	 Admin	roduction, istration dustry	May 1949 Former Cen Meat Office	
Meat Branch							
Fresh fats Rendered fats Smoked products Canned meat Canned hams		576 483 903 494 103		665 599 859 777 153		185 65 234 118	
Fruit and Vegetables		F\$.					
Marmalade and jellies Juices		559 113		322 91		10 15	

April production was exceeded in all items except in smoked products; however, production of bacon was 406 tons in excess of the plan.

Fats Industry

This industry greatly exceeded the production plan in all items.

Production of the More Important Items of the State Fats Industry

(In tons--estimated data)

<u>Item</u>	Apr 49	May 49
Raw oil	3,454	3,330
Refined oil	2,542	2,818
Margarine	1,598	1,860
Laundry soep	3,100	3,233

The processing of oleginous seeds amounted to 6,600 tons. The greatest production over the plan is noted in refined oil (45 percent) and margarine (about 33 percent).

For the 1949-50 season, the total area under contract for cleaginous seed crops will be about 92 percent more than in the 1948-49 agricultural year. The crop of 55,000 hectares of spring rapeseed has been pledged; contracts for the crop winter rapeceed should embrace an area of about 42,000 hectares.

Sugar Industry

The sugar industry is increasing the production of sugar and derivative products each year. In the agricultural year of 1949-50, it is estimated that the crop, bout 255,000 hectares, of sugar beets will be put under contract, exceeding by 32,000 hectares that of last year.

The plan estimates 1949-50 production at 620,000 tons. Last year the production plan was exceeded by 53,000 tons, and it is expected to be exceeded this year. At a May meeting or sugar industry workers, farmers, and planters, the following pledges were made: the workers pledged to exceed the 1949

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production plan by 80,000 tons of sugar; the representatives of the 600,000 farmors and planters plodged to increase the average yield from one hectare to 200 quintals (the average yield last year was 170 quintals).

In line with the general savings plan, the workers also pledged to save 2,400,000,000 zlotys; with improved methods the cost of producing one ton of sugar will be reduced by about 3,200 zlotys.

This year the sugar mills have pledged to reduce manufacturing waste from 3 percent to 2.71 percent. It is expected also that personnel costs will be 9 percent below estimates of the 1949-50 plan by shortening the operations season and increasing productivity. The 122 man-hours hitherto necessary for the production of one ton of sugar will be reduced to 111 man-hours.

Other Industries.

- The Association of the Confectionery Industry exceeded the plan 36 percent in the production of candy and 46 percent in the production of chocolate. The total production was 2,350 tons, or 201 tons more than in the previous month.
- 2. The Association for the Manufacture of Coffee and Food Substituter produced 2,361 tons of coffee substitutes, achieving the plan 117 percent. This year for the first time domestic seed was used in the planting of chicory, replacing 80 percent of the costly Belgian seed used thus far. Prewar production has been greatly exceeded. In 1948, the production of coffee substitutes, including chicory in Poland, amounted to one kilogram per capita, an increase of 150 percent over 1937. The price index for this group of commodities is only 48 percent over prewar prices.
- 3. The Association of the Potato Processing Industry processed 1,720 tons of potatoes. The vlan was achieved 169 percent, with a total production of 3,185 tons of potato products (April production was 2,781 tons).
- The Six-Year Plan provides for the modernization of the plants. Inassuch as domestic demand is fully satisfied, increased production will be based on the possibility of increasing the export of potato products.
- 4. The Alcohol Industry did not complete the plan in all branches. Production of rectified alcohol amounted to 5,827,000 liters, exceeding the plan 17 percent; production of anhydrous alcohol amounted to 1,645,000 liters. The plan was not completed in the production of raw alcohol due to a shortage of molasses. The production of pure whiskies dropped below the production of April, which was 3,130,000 liters, while the production in May was only 2,994,000 liters, or 90 percent of plan.
- 5. The Tobacco Industry achieved the production plan 115 percent. In May, cigarette production amounted to 1,728 million (131 percent of plan), while April production amounted to 1,663,200,000. Tobacco production in May amounted to 75,920 kilograms. Domestic raw material constituted about 80 percent of all material used. In addition to increasing the area cultivated, an effort is being made to improve the quality of the tobaccos cultivated and to increase the percentage of the higher grade tobaccos.
- In Radom, work is in progress on the expansion of the second largest eigerette factory in Poland. This plant has been equipped with modern US machines and at present produces about 20 million cigarettes daily. It is planned to increase the daily production next year to 28 million cigarettes.

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Forestry.

From 20 May to 10 June this year the program for combatting the tent caterpillar was carried on over an area of 25,000 hectares of state forests. This program, organized by the Ministry of Forestry, was carried on in the following wojewcdztwos: Slask-Dabrowa, Lodz, and Kielce. The use of chemicals in combatting these parasites in only a temporary measure. In order to eradicate the pests completely forest structure should be changed. Instead of the present system of one variety and one age of trees in a forest the system of mixed varieties and ages is being started.

The secondary production of the forests was discussed at a conference held for that purpose. At present, the forests can supply almost the entire demand of the tanning industry and thus greatly reduce costly imports. It is estimated that the crop of berries will amount to 7,400 tons and mushrooms 2,000 tons. The production of peat stable litter intended for export will greatly increase over last year's production.

This year's production of fresh-water fish in the state pends and lakes under the jurisdiction of the Administration of State Forests will amount to about 3,000 or 4,000 tens, or 260 tens more than 1948. The administration is also making an intensified effort to afferest the unused lands in the villages. The villages will receive about 100 million seedlings, which will be sufficient to afferest about 10,000 hectares. In order to develop the raising of seedlings, more than 6.5 tens of seeds were distributed. In the second quarter of thas year, about 12,000 ares of murseries were planted to supply the referestation program next year.

Fisheries.

The May catch of the Baltic fisheries amounted to 6,345 tons of fish, or 144 percent of the plan.

The market supply of fish was somewhat smaller due to a smaller fish catch in May than in April. The small fish catch was used to supply domestic demand. The demand for salt-water fish has almost exhausted the supply of frozen hake. The demand for herring is supplied chiefly through imports from Norway.

The supply of eel is considered good. With an increased catch it is expected that there will be a surplus or export.

The catch of fresh-water fish was adequate to meet the demand; the surplus was frozen for export and for domestic reserves.

The Polish fishing fleet, which has been greatly increased this year, will take part in deep-sea fishing expeditions. The Dalmor state enterprise is sending 16 ships; the Lawica, two ships, the Baltic Ship Company, two ships; and Delfin, the new enterprise now being organized, three ships.

The state has appropriated about 570 million zlotys for the development of the fishing industry in all its branches.

Maritime Activities

In May, freight traffic in the Gdynia-Gdansk port group amounted to 1,139,000 tons, 157,000 tons more than the April figure.

Total exports amounted to 907,700 tons, chief among which were coal and coke (the Gdynia-Gdansk group handled 90 percent of the export) imports amounted to 231,400 tons, the chief import being ore (158,700 tons). Freight handled in Gdansk was 73,500 tons more than that of Gdynia. During May, Szczecin Freight traffic decreased from 398,900 to 362,200 tons due to the seasonal drop in the export of coal and grain and also to the lapsing of the agreement with Sweden, the chief carrier of coal from that port (43,900 tons in April).

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The share of coal in the total export of 322,700 tons fell from 328,600 tons in April to 312,400 tons in May. Exports of grain and legumes dropped from 19,100 tons in April to 7,600 tons in May. May imports, amounting to 42,500 (43,900 tons in April), showed an increase in certain items such as ore, wood, cork, etc. The drop in freight handled in the port of Szczecin was reflected in the ship movements. In May, 272 ships and 328 barges arrived in Szczecin and 392 ships and 333 barges were cleared. Transit shipments from northern Germany to central Germany passing through Szczecin amounted to 17,400 tons (rye, brick, cats) and in the opposite direction 23,000 tons (briguettes and scrap iron). Barges passing through Szczecin in transit numbered 188.

In May, work was begun in Szczecin on the construction of the Foludniowy Wharf in the Kaszubski Basin and the Kwa Wharf in the Czechoslovakian section. Dredging is continuing in the small ports. The clearing of whecks is being relegated to second place since most of the sunken vessels which obstructed fort navigation have been raised. At present, the remaining small whecks are being cleared.

In Gdynia, the work of deepening the port entrance and the port channel is in progress. In Gdensk, the fifth ore and coal carrier is being completed.

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